Economix

User Guide

Module ORDER v2.0

ECONOMIX Solutions

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Module ORDER

Introduction to the module

The module « ORDER » is designed to answer your needs in the management of your orders. This tool allows you to manage completely the activities connected with your orders:

- Layaway management
- Special orders management
- Delivery arrangements management

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Module ORDER

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Module ORDER

Creating an order

1. Click the button **Search**

2. Search the customer with the search criterion offered

NOTE For the search criterion: **3. Name** and **4. Contact**, the order of inscription of the information is not necessary for more flexibility.

3. Once the search criterion complete, click **OK**

NOTE If the customer does not exist, the system will offer to consult the complete list. If you do not wish to consult the complete list, click **NO**.

4. Click the desired customer
5. Click the button **Order**

NOTE The result of the search can group together several customers. It is thus important to select the customer before clicking the button **Order**.

NOTE By opening the module invoice, the cursor will position automatically in the field **Model**, which will allow you to begin your product entry directly.

6. Enter the product code in the field **Model**
7. Press « Enter » on your keyboard to validate the product

NOTE The cursor will position inside the field **Quantity**.

8. Enter the desired quantity
9. Press « Enter » on your keyboard to validate the quantity

NOTE The cursor will position inside the field **Comment**.

10. Write a comment, if need be
11. Press « Enter » to validate the product

NOTE The cursor will position inside the field Model for the inscription of the next product.

NOTE Repeat this operation according to the number of different product to be put aside for the customer.

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12. Once the order is complete, click the button **Save**

13. Click the desired method of payment for a deposit, if need be

NOTE The amount of the order will be automatically entered in the field corresponding to the chosen method of payment. It is however possible to modify this amount with your keyboard to enter the desired deposit.

14. Click **Accept**

NOTE If no method of payment is selected, click **Yes**

Searching for a product in the field Model

1. Position the cursor inside the field **Model**
2. Press **F5** on your keyboard
3. Look for the desired product from the research criteria displayed
4. Select, among the list of products corresponding to the research criteria, the desired product by double-clicking

Modifying the requested date

1. Position the cursor inside the field **Required date**
2. Enter the date required by the customer

NOTE All the delivery reports and orders to be delivered reports refer to the required date and not the date of the invoice's creation.

Modifying the quantities

1. Position the cursor inside the field **Ordered** present in the validated products grid
2. Enter the desired quantity ordered

NOTE Once the ordered quantity is modified, the automatic calculations of the taxes and totals will be refreshed with the new data.

Modifying a price on an order

1. Position the cursor inside the field **Price** present in the validated products grid
2. Enter the desired price

NOTE Once the price is modified, the automatic calculations of the taxes and totals will be refreshed from the new data.

Applying a discount on a product

1. Position the cursor inside the field **Dis (%)** present in the validated products grid
2. Enter the desired discount

NOTE The field **Dis (%)** is pre-formatted in percentage. If the desired discount is 20%, the user must enter 20 in the field **Dis (%)** and not 0.20.

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Withdrawing a product from the validated products grid

1. Position the cursor inside the field **Model** present in the validated products grid
2. Press simultaneously on the keys **Ctrl + Del** on your keyboard
3. Click **Yes** to confirm the cancellation of this product on the purchase order

Changing the printing type

1. Click the desired printing button:
   Small size: Size compatible with printers emitting receipts
   Large size: Size compatible with the regular printers
   Email: Size compatible with PDF and directly integrated with Microsoft Office Outlook
   Nothing: No printing is desired
   N.B.: The purchase order will be saved anyway for ulterior consulting / reprinting purposes.
2. Click **Accept**

NOTE The integration of PDF purchase orders with Microsoft Office Outlook is possible only if the customer form related to the orders contains an e-mail address.

Assigning multiple deposits

1. Click the button of the first method of payment desired
2. Enter the first payment amount

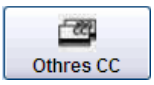
NOTE The cursor will position automatically in the field corresponding to the chosen method of payment.

3. Click the button of the second method of payment desired

NOTE The second payment amount will automatically be entered in the field corresponding to the chosen method of payment.

4. Click **Accept**

Creating a method of payment

1. Click the button **Other CC** 

2. Click **Add**
3. Enter the code and the description of the new type of payment
4. Click **Save**
5. Click **Exit**

Assigning a salesman to an order

1. Click on the field **Salesman**
2. To select an existing salesman, click on the desired salesman among the list beforehand defined in the menu **Options - User**

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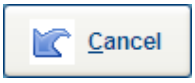
Reaching the history of the customer's order from the current order

1. Click the button **History**

Reaching the customer from the current order

1. Click **Customers** located in the left superior corner

Canceling products on a current order

1. Click the button **Cancel** 

Consulting a previous order or modifying an active order

1. Click the menu **Order** / **Quotation**
2. Click **Order - Consulting**
3. Enter the number of the order
4. Click **OK**

Correcting a deposit from an active order

1. Click the button of the former method of payment to modify
2. Enter the negative amount in the field corresponding to the method of payment to correct
3. Click the button of the new method of payment desired
4. Enter the new amount in the field corresponding to the new method of payment
5. Click **Accept**

NOTE The module ORDER being directly integrated into the management of the cash register, the modifications entered on the order produced will apply automatically in the cash register.

Modifying the delivery address on an order

1. Position the cursor inside the field **Address** situated in the left superior corner
2. Enter the new information

NOTE This information will be effective only for the current order. For permanent modifications, these must be directly corrected in the customer form of the concerned customer.

Billing an order

1. Position the cursor inside the field **Delivery date**
2. Enter the delivery date

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3. Position the cursor inside the field **Ship** present in the validated products grid
4. Enter the quantity to charge

NOTE It is not necessary to charge an order altogether, the order can remain opened.

NOTE The courtesy reminder window will appear at the time of validating a product to be charged. This feature is only configured for products having beforehand been defined as being eligible to a program of courtesy.

5. Repeat this operation according to the number of different product to be charged to the customer.
6. Click **Invoicing**
7. Click **Yes**

NOTE It is possible to complete the invoice with other products.

8. Click the button **Pay**
9. Position the cursor inside the field **Account**, if an account was paid
10. Enter the amount of the deposit to be deducted from the invoice, this deposit can be partially used or in total
11. Click the desired method of payment
12. Click **Accept**

NOTE Once the order is charged, the system will keep it in the history of the concerned customer form, but it does not appear any more in reports. The complete order reports can however be exported in Microsoft Excel format.

Assigning a method of delivery

1. Position the cursor inside the field **Expedition**
2. Press **F2** on your keyboard to visualize the method of delivery registered, if need be
3. Select the desired method of delivery by double clicking

NOTE If the method of delivery does not exist, just enter it in the field **Expedition** and the system will register it.

Canceling an order

1. Position the cursor inside the field **Model** present in the validated products grid
2. Press simultaneously on the keys **Ctrl + Del** on your keyboard
3. Click **Yes** to confirm the cancellation of this product on the purchase order
4. Repeat this operation for all the products of the purchase order.
5. Click **Save**

6. Click **Accept**

NOTE The cancellation of all the products of a purchase order will remove them from reports but this empty purchase order will remain in the customer's purchase order history.

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